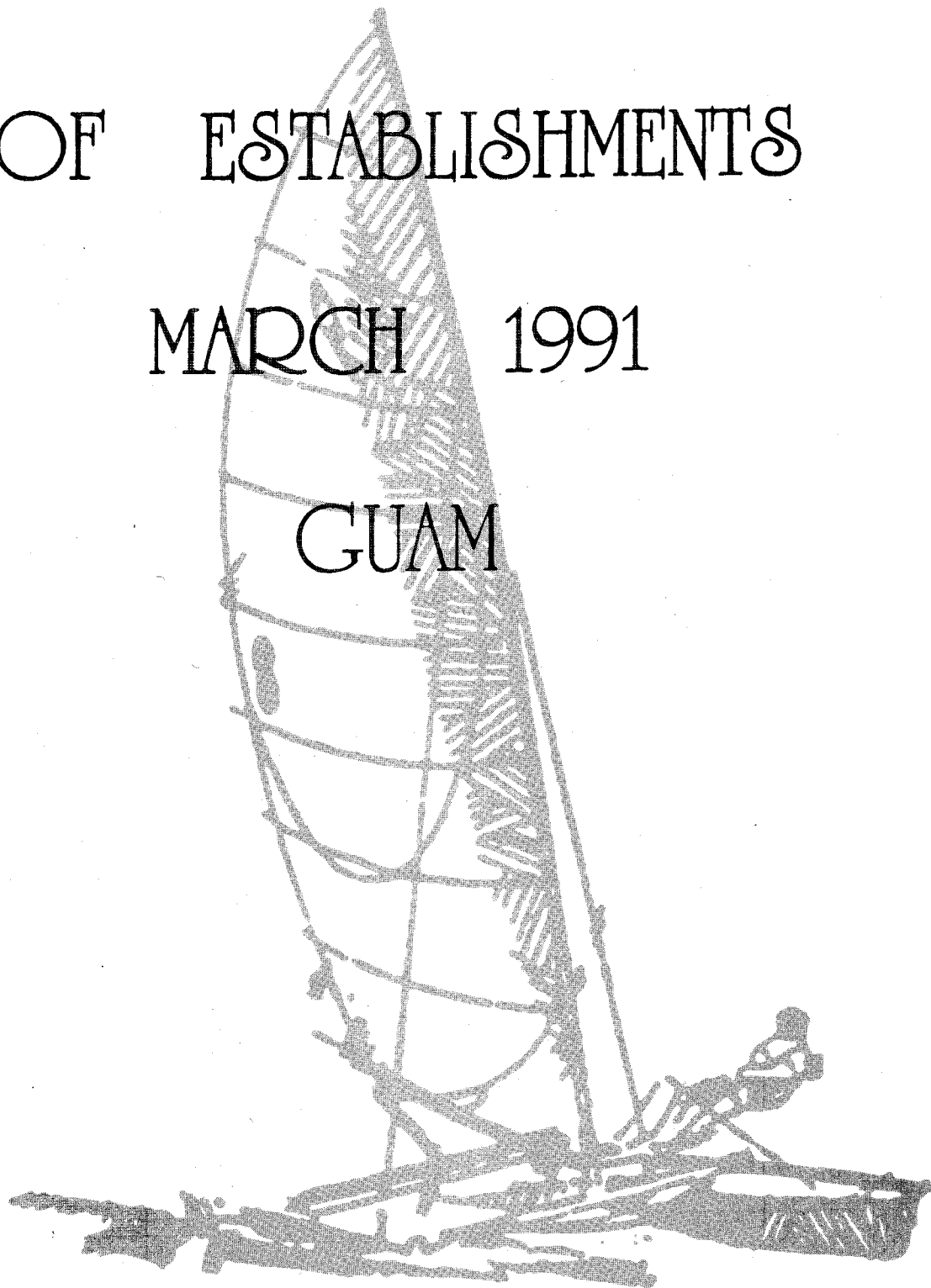


ANNUAL CENSUS
OF ESTABLISHMENTS
MARCH 1991
GUAM



ANNUAL CENSUS OF
ESTABLISHMENTS

Guam

March 1991

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March 16, 1992

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The project leader was Gary A. Hiles. Sunny K. Bathan formatted this report. Lisa J. Whitehouse and Marie S. Heflin were primarily responsible for the voluminous task of maintaining the address file, mailings, editing, follow-up, and key punching necessary to conduct this survey. Invaluable assistance was provided by Bill Massey and Celi S. Cruz.

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ANNUAL CENSUS HIGHLIGHTS

The March 1991 Annual Census of Establishments report is the eighth consecutive annual publication for this employer establishment census survey on Guam.

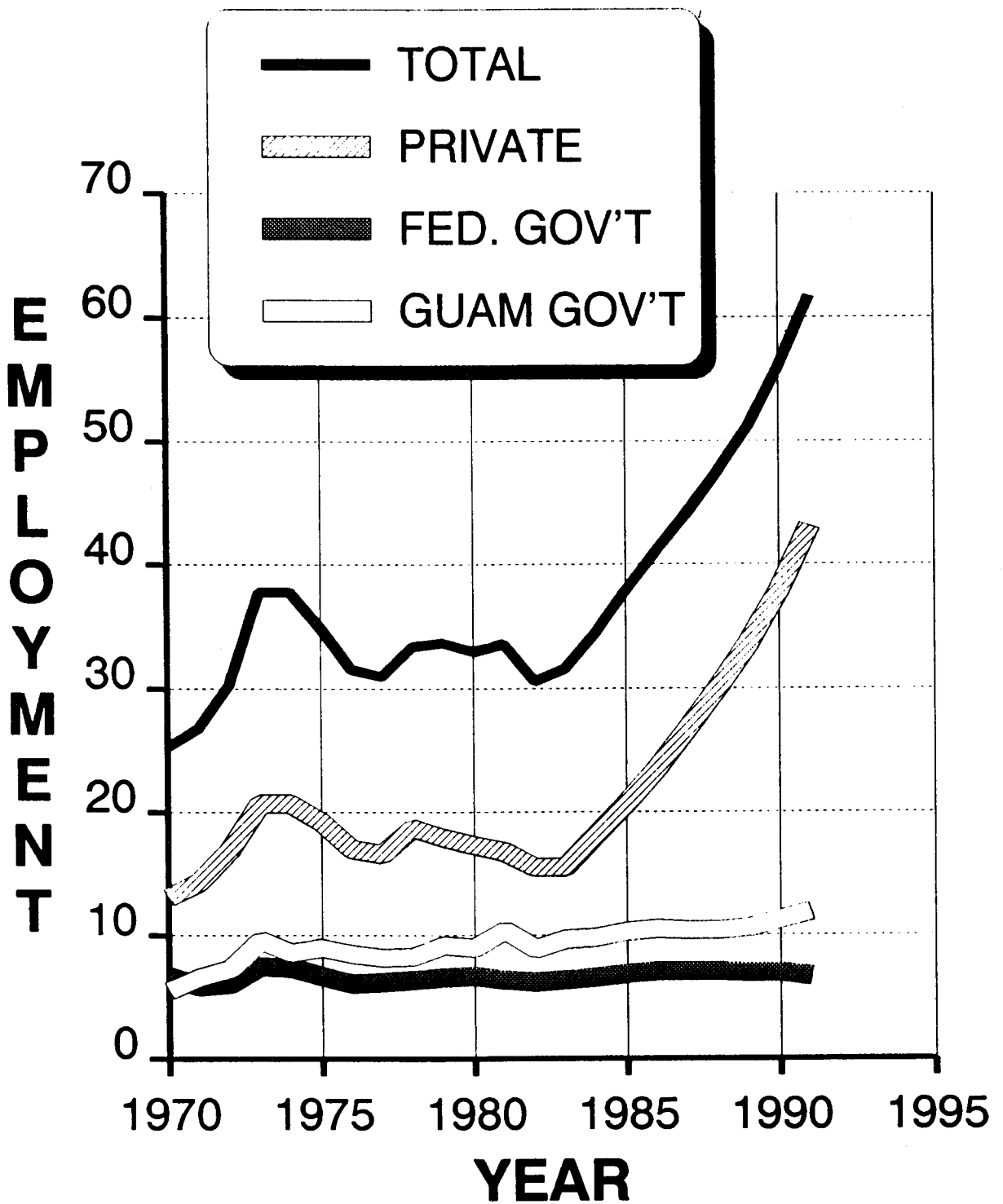
During the five year period from March 1986 to March 1991, employment growth has been very substantial with an overall increase of 20,436 jobs representing a 67 percent increase. Private sector employment during this period increased by 55 percent, whereas, government employment increased by only four percent. The percentage increases by private industry and public sector during this period are as follows:

	1986	1991	Change
Construction	4,220	10,420	+ 147%
Agriculture	140	290	+ 107%
Transportation and Public Utilities	1,950	3,700	+ 90%
Services	6,660	11,870	+ 78%
Retail Trade	6,260	10,550	+ 69%
Wholesale Trade	1,140	1,850	+ 62%
Manufacturing	1,300	1,950	+ 50%
Finance, Insurance, And Real Estate	1,830	2,450	+ 34%
Govt. of Guam	10,670	11,890	+ 11%
Federal Govt.	7,120	6,730	-5%

Distribution tables of private sector employers by employee size and industry are contained in Table 3 of the 1988, 1989, 1990, and 1991 reports. A comparison by year is shown below:

YEAR	TOTAL	ESTABLISHMENT COUNT					
		1-4	5-9	10-19	20-49	50-99	100-UP
1988	1,941	877	461	272	230	63	45
1989	2,058	880	540	268	243	73	54
1990	2,136	860	553	321	259	86	57
1991	2,337	929	568	393	267	111	69

**YEARLY PAYROLL EMPLOYMENT TOTALS
(IN THOUSANDS)**



Trends in Average Hourly & Real Earnings

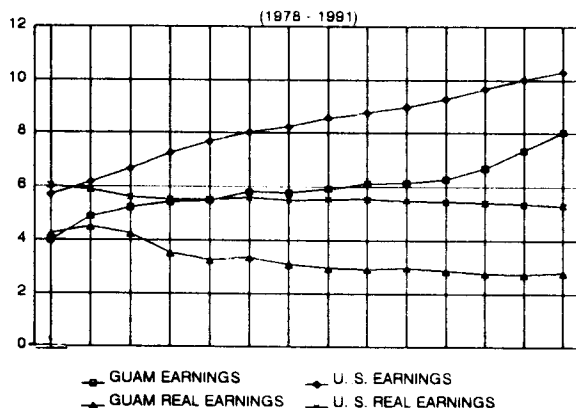
Over the last decade average hourly earnings of private sector nonsupervisory or production workers on Guam have increased 49% from \$5.41 to \$8.04 while the U.S. average has increased by almost the same percentage rate, 42% from \$7.25 to \$10.31. While wage increases on Guam were lower during the early part of the decade, during the most recent five year period the increase on Guam was 31% versus 18% for the U.S. The average hourly earnings in the U.S. for this group is now 28% above Guam's.

Earnings adjusted for inflation as a measure of the buying power of earnings - real earnings - declined 4% over the decade in the U.S. while they declined 20% on Guam. More alarming is the decline in real earnings over the 13 year period from 1978 - 1991, in which they declined to only 66% of their 1978 level for Guam and 88% of the 1978 level for the U.S. During this period real earnings were eroded substantially in all industry division on Guam, the declines range from 47% for transportation to 12% for construction. The transportation industry on Guam in 1978 had the highest monetary earnings substantially above all other industries. It has seen the lowest growth in earnings and has suffered the greatest plunge in real earnings as the hourly earnings become more closely aligned with earnings in other industries. Deregulation of the airline industry is thought to be a major factor in this. In the most recent two year period on Guam, monetary wages have risen a little faster than the consumer price index, resulting a 1% increase in real earnings in what appears to be a turn around in the long downward trend.

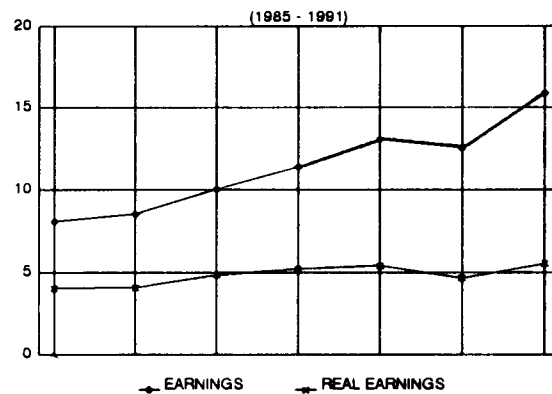
Government of Guam average hourly earnings of all employees increased 96% over the six year period from 1985 to 1991 and their real earnings rose 36%.

Consumer Price Index (CPI) deflators are used to compute real earnings by dividing the monetary earnings by the CPI. While monetary earnings growth for non-supervisory workers on Guam closely parallels that of the U.S., the CPI index for Guam shows price levels tripling (304%) versus doubling (207%) for the U.S. from 1978 to 1991.

GUAM & U.S. PRIVATE SECTOR



GOVERNMENT OF GUAM



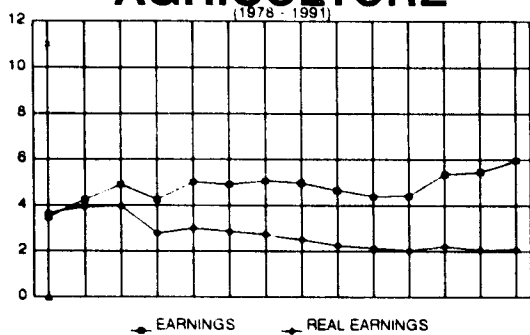
Sources:

Department of Commerce, Government of Guam (Consumer Price Index - March data for each year)

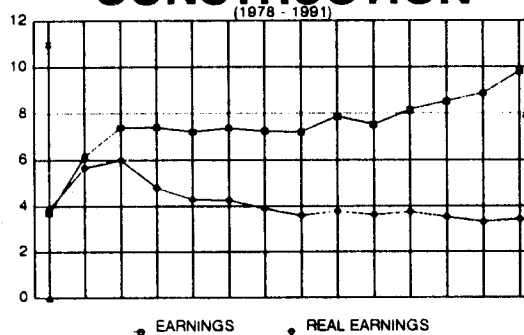
U.S. Department of Labor (Annual data: Consumer Price Index, U.S. city average, all items and major groups and Average hourly earnings)

Department of Labor, Government of Guam (Average Hourly Earnings - Current Employment Statistics - March data for each year)

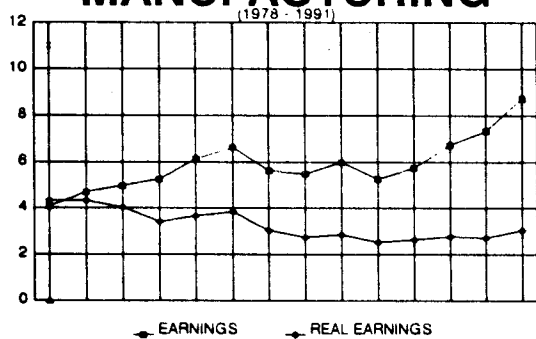
AGRICULTURE



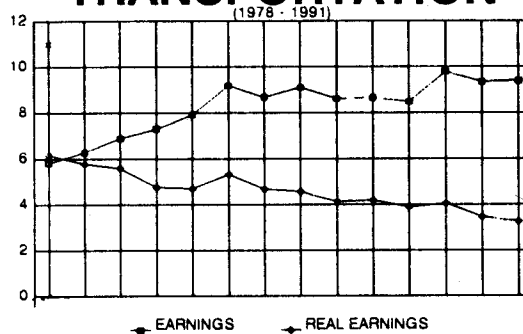
CONSTRUCTION



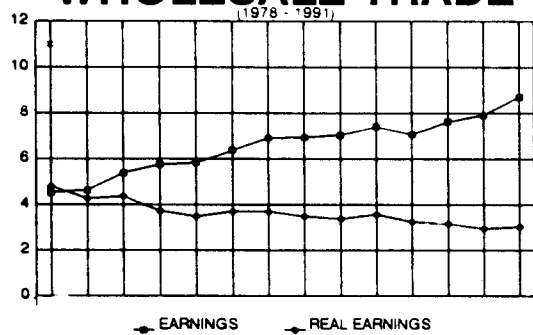
MANUFACTURING



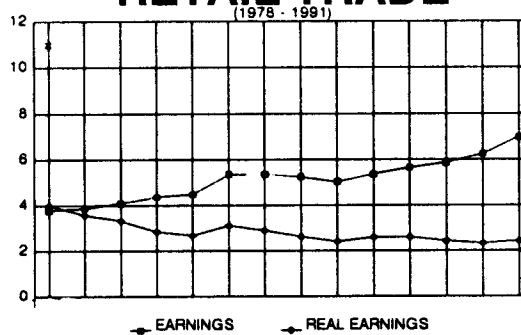
TRANSPORTATION



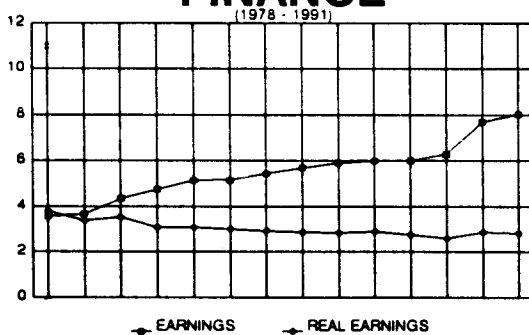
WHOLESALE TRADE



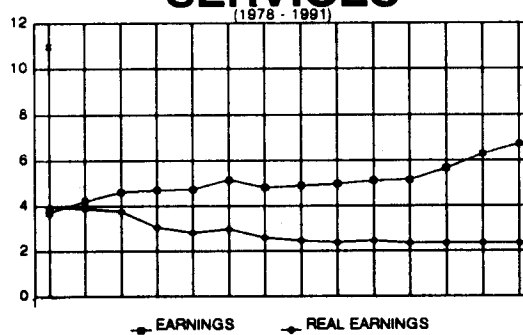
RETAIL TRADE



FINANCE



SERVICES



**TABLE 1. EMPLOYMENT AND ESTABLISHMENT
DISTRIBUTION BY LOCATION**

LOC. CODE	LOCATION NAME	1989 NUMBER OF ESTABLISHMENTS	1990 NUMBER OF ESTABLISHMENTS	1991 NUMBER OF ESTABLISHMENTS	1989 EMPLOY- MENT	1990 EMPLOY- MENT	1991 EMPLOY- MENT
10	AGANA	465	461	498	10,614	11,862	13,145
11	EAST AGANA	29	25	27	492	464	511
12	ANIGUA	68	72	70	831	917	916
20	AGANA HEIGHTS	17	23	24	296	367	391
30	AGAT	22	23	23	182	242	349
41	ASAN	17	19	19	93	121	160
42	MAINA	*	5	*	*	15	*
43	ADELUP	8	8	8	187	220	239
44	NIMITZ HILL	*	*	*	*	*	*
50	BARRIGADA	48	48	56	782	734	953
51	CANADA BARRIGADA	*	*	*	*	*	*
61	CHALAN PAGO	11	11	13	133	239	180
62	ORDOT	7	7	7	77	102	91
63	PAGO BAY	*	*	*	*	*	*
70	DEDEDO	171	175	202	1,972	1,907	2,294
71	FINEGAYAN	*	*	*	*	*	*
80	INARAJAN	*	*	*	*	*	*
81	MALOJLOJ	*	*	*	*	*	*
90	MANGILAO	40	42	42	2,493	2,501	2,646
91	MAGA MANGILAO	6	7	6	49	63	55
92	TAI MANGILAO	*	*	*	*	*	*
100	MERIZO	7	*	*	20	*	*
111	MONGMONG	10	11	11	87	105	151
112	TOTO	*	*	*	*	*	*
113	MAITE	62	73	80	775	1,075	1,400
120	PITI	13	14	14	112	123	133
121	SUMAY	*	*	*	*	*	*
130	SANTA RITA	*	*	*	*	*	*
131	APRA HEIGHTS	*	*	*	*	*	*
140	SINAJANA	12	13	11	186	204	195
141	AFAME	*	*	*	*	*	*
150	TALOFOFO	5	5	*	73	67	*
151	IPAN	*	*	*	*	*	*
152	WINDWARD HILLS	*	*	*	*	*	*
160	TAMUNING	632	649	720	12,008	13,486	14,917
161	IPAO-TUMON	156	171	202	4,836	5,396	6,366
162	HARMON	229	248	264	5,855	6,762	7,756
180	YIGO	20	24	26	300	389	446
190	YONA	12	12	13	272	214	212
201	CABRAS ISLAND	26	27	26	948	1,064	1,098
202	COCOS ISLAND	*	*	*	*	*	*
211	NAVAL AIR STATION	*	*	*	*	*	*
212	NAVAL STATION	7	7	7	5,521	5,098	4,949
213	NAVAL COMM. STATION	*	*	*	*	*	*
221	ANDERSEN A.F.B.	12	11	11	1,441	1,413	1,357
TOTALS		2,143	2,224	2,423	51,459	56,129	61,726

* Fewer than 5 establishments

NOTE: This table includes establishments in public and private sectors. Government agencies with multiple locations are reported under the headquarter's location. Private sector employment is reported by actual location of each establishment with a few minor exceptions for multi-establishment firms which report their entire employment under the headquarter's location.

MAP OF GUAM

